



Diesel Light-duty Vehicles: Potential in the US Market

**Robert Bosch Corporation Presentation to the CEC Committee
Workshop on Transportation Energy Demand Forecasts and Options to
Reduce Petroleum Fuel Use**

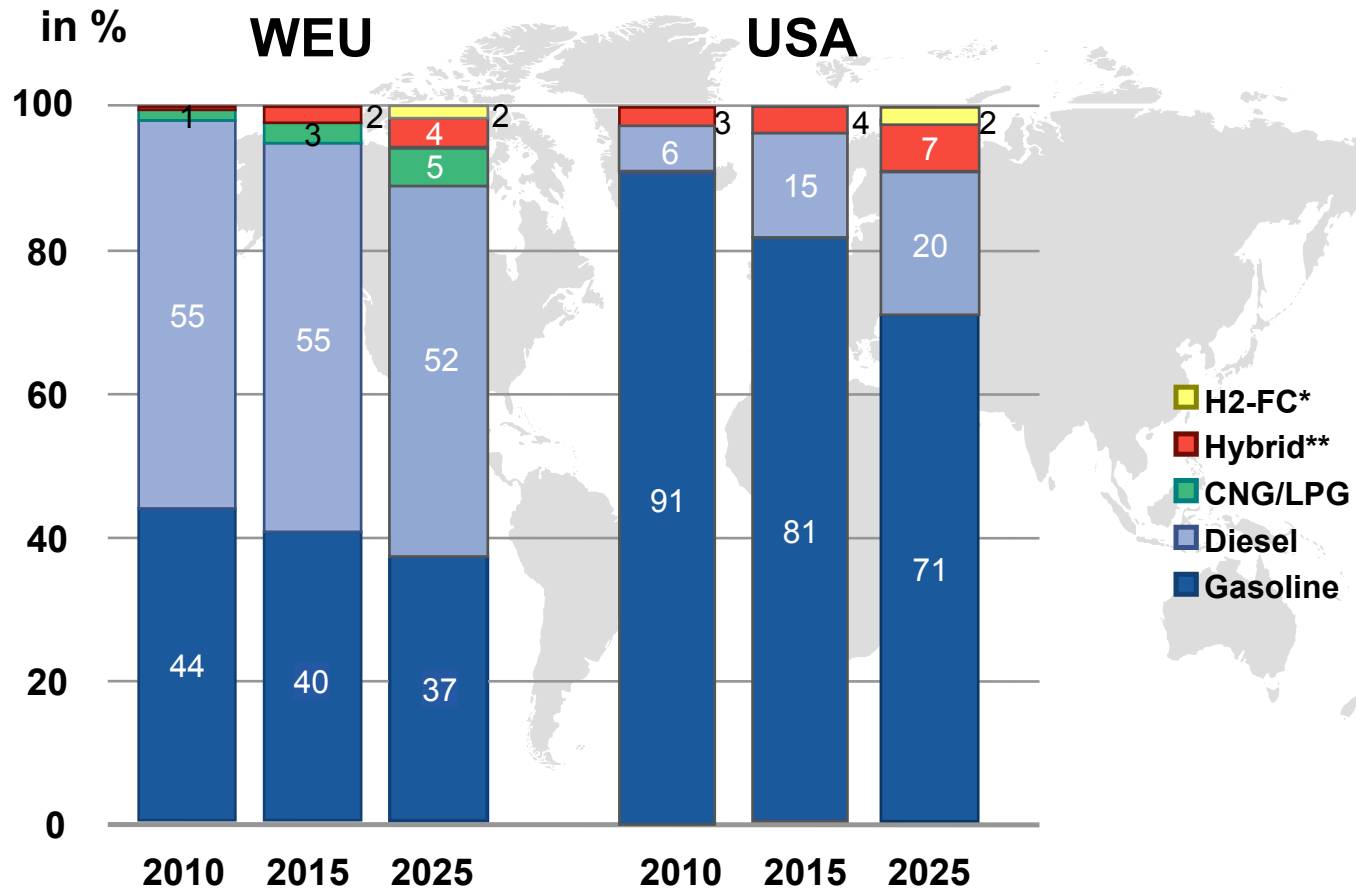
Docket 04-IEP-1A

**Sacramento, CA
May 17, 2005**



Vehicle Powertrain Market Trends

Light Vehicle Market Share Sales by Powertrain Technology



Source: Bosch Internal Estimate

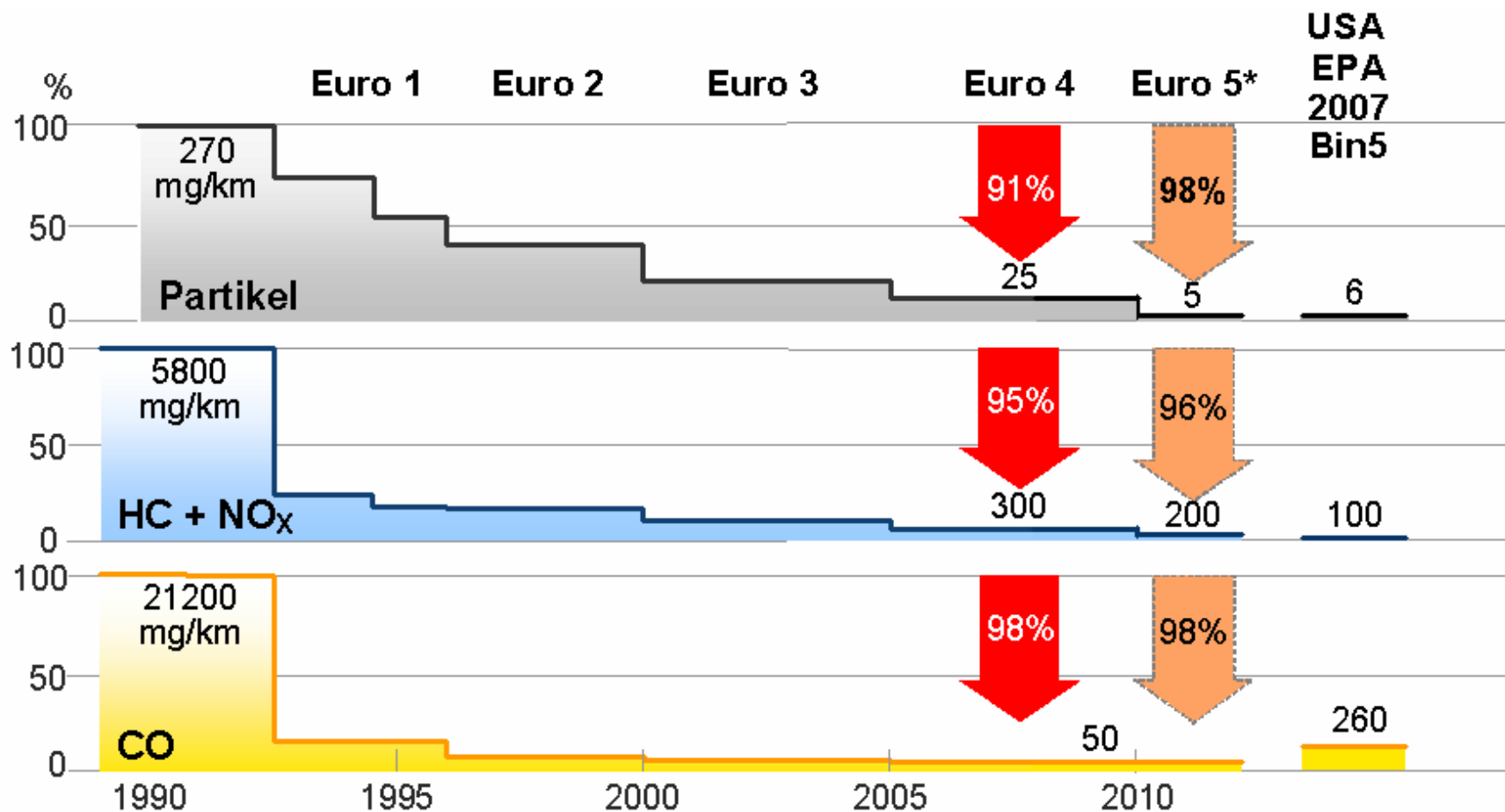
* Market share H2-FC world 2015<0,5%

** Only Mild and Strong HEVs



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European Emission Development 1990 - 2010



* not defined yet; expected scenario

Diesel Systems

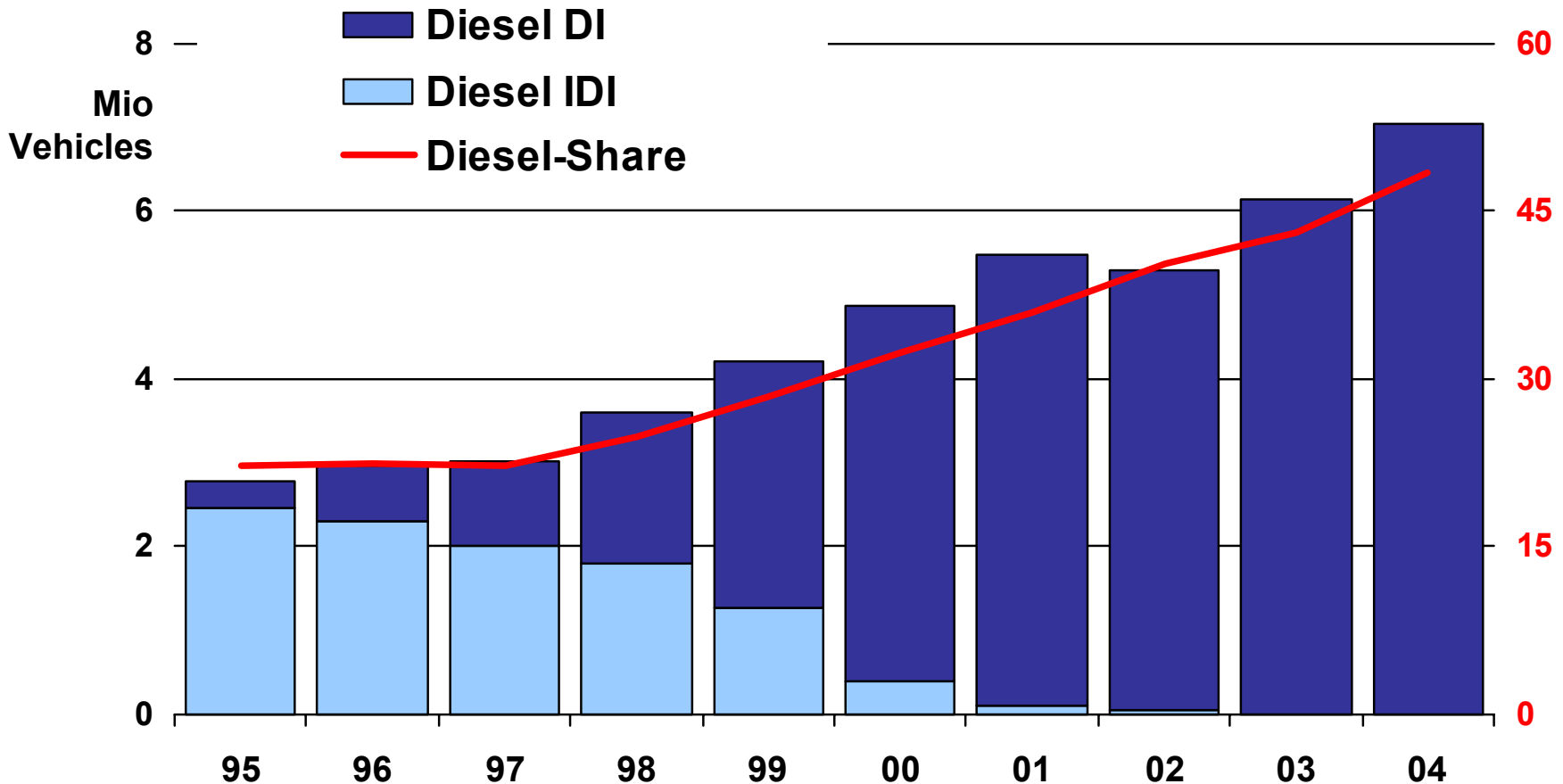


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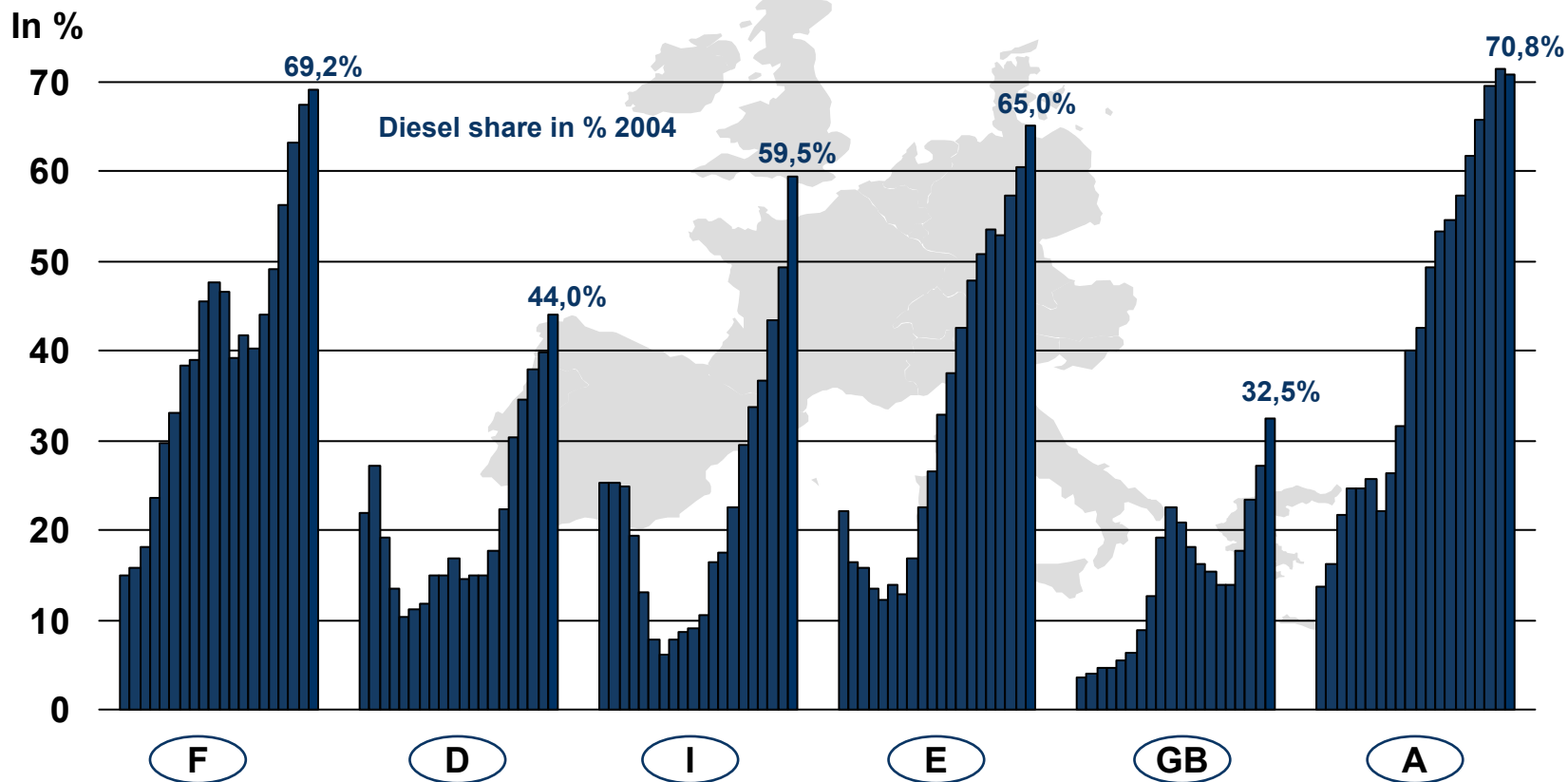
Registrations Pass. Cars in WEU



**Diesel
Share [%]**



Diesel Share PC Registrations 1985 – 2004

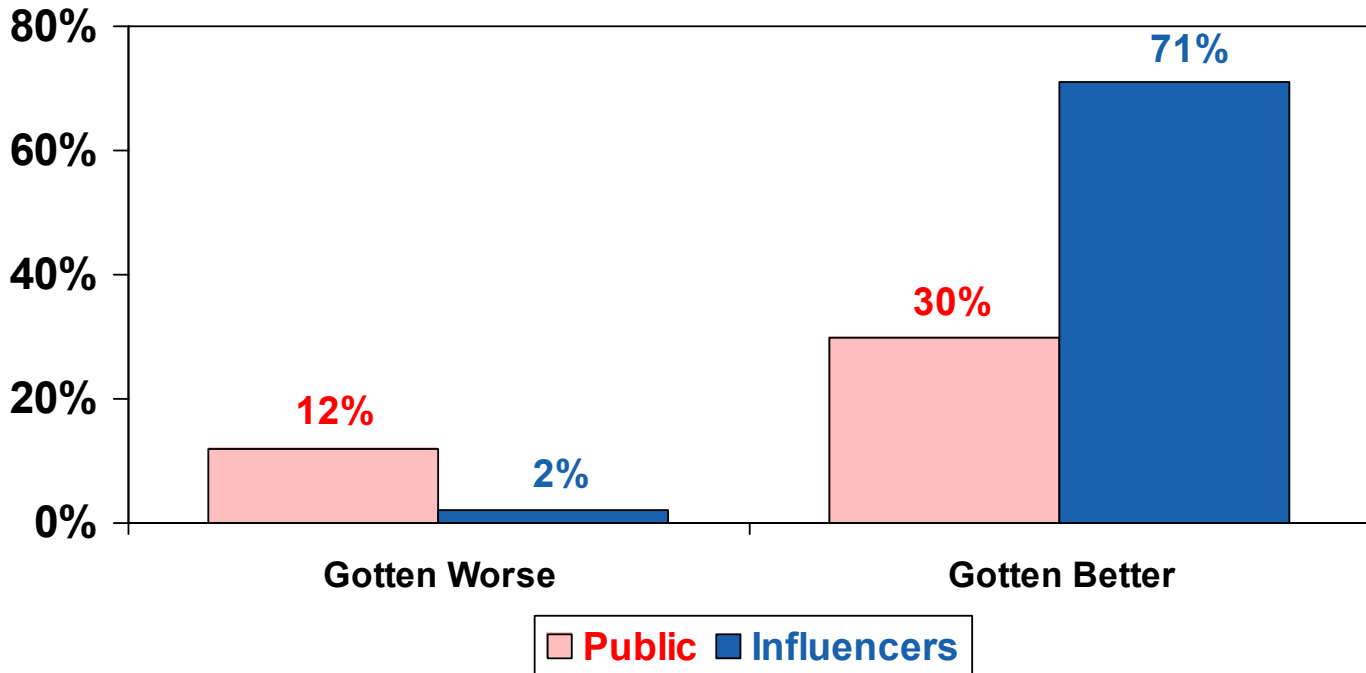


Source: Marketing Systems 03.2005



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Related to the environment, Diesel has...



Source: Diesel Technology Forum 2003 Public Opinion Survey



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There are many reasons why clean diesel must be considered as one of several paths to reducing California's use of petroleum:

- ▶ Clean diesel is ready today
- ▶ Fuel economy improvements are documented in the real world
- ▶ Operating costs are lower
- ▶ Emission levels are in check (and will be reduced as ultra-low sulfur diesel fuel becomes available in 2006, as it is in Europe today)
- ▶ The diesel fueling infrastructure exists (available in 42 percent of retail gasoline locations)
- ▶ Consumers want them.



Thank You

